

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for DOH
- Readiness Workplan

DOH Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Robert Herron

CCN Composition



The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 9
- Vacant Role = 0

RW Task Completeness



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

- Score = 100.00%
- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

- Score = 99.57%
- Submitted On Time = 19
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

| Project Impact | Critical Operational Element | Task ID | Task Name | Task Planned Start Date | Task Planned End Date | Agency Reported Task Progress | Agency Submission Date | Status Comment | Project Verification of Completion | Agency Corrected Submission Date |
|----------------|------------------------------|---------|--|-------------------------|-----------------------|---|------------------------|---|------------------------------------|----------------------------------|
| | Technology | 504 | Update Agency Business System Documentation for Segment I | 10/30/23 | 01/12/24 | 100% - Submitted | 01/10/24 | | | |
| | Technology | 505 | Update Florida PALM Interface Inventory for Segment I | 10/30/23 | 01/12/24 | 100% - Submitted | 01/10/24 | | | |
| | Processes | 508 | Review Payroll Wave Business Process Models | 11/06/23 | 01/26/24 | 100% - Submitted | 11/20/23 | Reviewed the Payroll process and workflow with HR on October 9, 2023 | | |
| | N/A | 509 | Submit Bimonthly Agency Readiness Status Report | 12/28/23 | 01/12/24 | 100% - Submitted | 01/10/24 | | | |
| | N/A | 510 | Manage Agency Specific Implementation Schedule, Risks and Issues | 12/28/23 | 02/29/24 | 100% - Submitted | 02/22/24 | Added a new Risk and Assumption | | |
| | People | 511 | Update CCN and Contacts | 01/08/24 | 01/26/24 | 100% - Submitted | 01/10/24 | Reviewed and Updated | | |
| Indirect | People | 512 | Identify Future Florida PALM End Users | 01/16/24 | 03/01/24 | 100% - Submitted | 02/20/24 | Initially DOH added 13230 users, we had no Business Process Groupings for 12773 users, these are our EIC users. Per suggestion from the PALM Project RC we have removed EIC users and have now submitted 457 users with Business Process Groupings. | Submission Complete | |
| Direct | Data | 513 | Complete Configuration Workbooks for Segments I and II | 02/12/24 | 04/12/24 | 50% - In Progress | | | | |
| N/A | Data | 514 | Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II | 01/29/24 | 04/12/24 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | Processes | 515 | Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II | 01/29/24 | 04/12/24 | 50% - In Progress | | | | |
| N/A | Technology | 516 | Update Agency Business System Documentation for Segment II | 01/29/24 | 04/12/24 | 50% - In Progress | | | | |
| Indirect | Technology | 517 | Update Florida PALM Conversion Inventory for Segment II | 01/29/24 | 04/12/24 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| Indirect | Technology | 518 | Update Florida PALM Interface Inventory for Segment II | 01/29/24 | 04/12/24 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | Technology | 519 | Remediate Agency Business Systems based on Segment I | 01/29/24 | 06/28/24 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 520 | Update Authorized Smartsheet Users | 02/05/24 | 02/16/24 | 100% - Submitted | 02/14/24 | | | |
| N/A | N/A | 521 | Submit Bimonthly Agency Readiness Status Report | 03/01/24 | 03/11/24 | 100% - Submitted | 03/11/24 | Submitted on 03/07 | | 03/11/24 |
| N/A | N/A | 522 | Manage Agency Specific Implementation Schedule, Risks and Issues | 03/01/24 | 04/30/24 | | | | | |

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 457

- Business Process Groupings = 12

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 62

- Related Business Systems = 10
- Related Reports = 27

Documentation Status:

- Complete = 62 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 58

Criticality:

- High = 58 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 58 Partial = 0 Not Started = 0

Cataloged Interfaces = 39

Data

Information used in or produced from an agency's financial business operations.

Current-State:

Unique FLAIR Data Elements = 629

- Associated Unique Uses = 646

- Continued Use - Yes = 0

- Continued Use - No = 0

Associated Business Systems = 1

Cataloged Reports = 653

Implementation:

Impacted Agency Business Processes = TBD

- Inbound Interfaces = 21
- Outbound Interfaces = 15

- Criticality:
- High = 947 Med = 0 Low = 0 None = 0

Implementation:

Business Systems Planned for Integration = 50

• Segment I - Documentation Updates:

- Complete = 50 Updating = 0 Evaluating = 0
- Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates: TBD

Planned Interfaces = 10

- Inbound Interfaces = 5
- Outbound Interfaces = 5

Implementation:

Configuration Workbooks = TBD

Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOH Risks

| Critical Operational Elements | Risk Description | Status | Risk Rating | Mitigation/Response Strategy | Reporting Period Comments or Updates | Date of Status Change | Owner / Coordinator |
|----------------------------------|--|--------|-----------------|---|--------------------------------------|-----------------------|---------------------|
| Technology | Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements. | Open | 9 (High/High) | DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk. | N/A | 02/14/22 | PALM & DOH |
| Processes Technology | Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks. | Open | 9 (High/High) | Pre-design and design activities based on calculated assumptions. | N/A | 02/14/22 | PALM & DOH |
| People Processes Technology Data | Payroll Design Sessions are scheduled to complete / finalize by the PALM project in June-July 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files. | Open | 9 (High/High) | Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications. | N/A | 07/19/23 | PALM & DOH |
| Processes | Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be completed with the Account field which combines the current FLAIR General Ledger Code and Object Code. | Open | 9 (High/High) | DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information. | N/A | 08/11/23 | PALM & DOH |
| Processes | The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well. | Open | 9 (High/High) | Work with PALM and DFS to set up a successful Service Level Expectation. | N/A | 08/16/23 | PALM & DOH |
| Technology | Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end. | Open | 9 (High/High) | DOH would like to see a prototype system, actual screens so SME's can figure out the processes. | N/A | 08/21/23 | PALM & DOH |
| Processes | DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM. | Open | 9 (High/High) | Review and understanding of Grant Reporting functionality within PALM | N/A | 08/23/23 | PALM & DOH |
| Processes | PALM eliminating the IBI field for DOH | Open | 9 (High/High) | Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team. | N/A | 02/14/22 | PALM & DOH |
| People Processes Technology | The training timeframe given will not be enough time for us to create and launch agency specific trainings. End users won't have time to take them before go live either. | Open | 9 (High/High) | We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM) | N/A | 09/25/23 | PALM & DOH |
| Technology | Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques | Open | 6 (High/Medium) | DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings. | N/A | 02/14/22 | PALM & DOH |
| Processes | With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation. | Open | 6 (High/Medium) | DFS publishes the processes well in advance for DOH has time to adapt and modify current processes. | N/A | 10/18/23 | PALM & DOH |
| People Processes | Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management System (STMS), our trips were sampled for audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and | Open | 6 (High/Medium) | DOH would like to know if there are any new processes and changes that are discussed at Enterprise level that will impact DOH | 2/21/2024 | 02/21/24 | PALM & DOH |

| | | | | | | | |
|-----------|---|------|----------------------|--|-----|----------|------------|
| | a struggle to learn a new system and deal with the influx in sampled trips being returned. | | | | | | |
| Processes | Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or December 2025 when PRP is to process in January 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 2026? • If only the balances are rolling over to PALM, then what about the voucher details? This is specific for Payroll Reallocation, but this will be true for all Vouchers. | Open | 4 (Medium/Medium) | DOH needs to know how this will work in PALM | N/A | 10/18/23 | PALM & DOH |

| DOH Issues | | | | | | | |
|-------------------------------|-------------------|--------|----------|-----------------|--------------------------------------|-----------------------------------|---------------------|
| Critical Operational Elements | Issue Description | Status | Priority | Resolution Plan | Reporting Period Comments or Updates | Planned or Actual Resolution Date | Owner / Coordinator |
| | | | | | | | |

| DOH Assumptions | | | | | | |
|----------------------------------|---|--------|------------------------|--|---|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments or Updates | |
| People Processes Technology Data | PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc. | Logged | 06/28/23 | All DOH systems | PALM Project has identified all impacted enterprise applications. | |
| People Processes Technology Data | PALM will maintain the project "On schedule" | Logged | 06/28/23 | All DOH systems | DOH PALM team relies on PALM Project schedule and plans deliverables and tasks accordingly. Resource allocation is also heavily based on PALM schedule. | |
| People Processes | Enterprise entities like AG/IG's office, or Agencies like DMS, DFS will not add changes or new processes at Go-Live or during PALM HyperCare period | Logged | 02/14/24 | DOH staff | DOH PALM team has addressed this with the RC in our Readiness Meeting | |

| DOH Agency-Specific Readiness Activities | | | | | | |
|--|---|----------|--|---|---|--|
| Critical Operational Elements | Activity Description | Date(s) | Impacted Stakeholder(s) and/or System(s) | Objective | Reporting Period Comments or Updates | |
| People Processes Technology Data | Discuss PALM Project Concerns | 02/09/24 | PM and Key Stakeholders | Address concerns of potential risks/issues | None | |
| People Processes Technology Data | DOH PALM_CORTNE Meeting | 02/14/24 | PM, BA, Technical Lead, EAS, & CORTNE Team | Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation | Questions regarding and technical solution for Approved Operating Budget application was addressed. | |
| People Processes Technology Data | DOH PALM_CORTNE Meeting | 02/16/24 | PM, BA, Technical Lead, EAS, & CORTNE Team | Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation | Questions regarding and technical solution for Approved Operating Budget application was addressed. (Continued discussion) | |
| People Processes Technology Data | Agency Readiness Tasks Review | 02/21/24 | PM, Technical Lead, BA, and Developers | Overview of the next PALM Agency Readiness Tasks due over the next few months. | None | |
| People Processes Technology Data | Technical Solution FDD Session: MIPS | 02/22/24 | PM, BA, Technical Lead, EAS, & MIPS Team | Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation | Questions regarding and technical solution for MIPS application was addressed. | |
| People Processes Technology Data | Technical Solution FDD Session: RIMS | 02/26/24 | PM, BA, Technical Lead, EAS, & RIMS Team | Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation | Questions regarding and technical solution for RIMS application was addressed. | |
| People Processes Technology Data | Technical Solution FDD Session: VPS | 02/26/24 | PM, BA, Technical Lead, EAS, & CMS Team | Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation | Questions regarding and technical solution for VPS application was addressed. | |
| People Processes Technology Data | Technical Solution FDD Session: EH Database | 02/28/24 | PM, BA, Technical Lead, EAS, & Environmental Health Team | Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation | Questions regarding and technical solution for EH Database application was addressed. | |
| Processes Data | Business Processes and APIs | 01/08/24 | Technical Lead, Developers | Help PALM team understand Business Processes and API's. | High level discussion of interfaces of Segment I & II that were released by PALM | |
| Processes Technology Data | Disbursements As-Is Meeting | 01/05/24 | BA, Technical Lead, and Developers | Help PALM team understand the daily processes used by DOH Disbursements team | BA created and presented powerpoint presentation of high level processes | |
| Processes Technology Data | FIS Requirements Review | 02/02/24 | BA, Technical Lead, and Developers | Finalize draft of FIS Requirements written by BA and Developer before presenting to client | FIS Requirements were reviewed and finalized by PALM Team | |
| Technology Data | Data Mapping Session (FDW) | 02/21/24 | PM, Technical Lead, BA, EAS, and Developers | Work on data mapping for PALM output to FDW application | None | |
| Technology Data | Data Mapping Session (Input Files) | 02/23/24 | PM, Technical Lead, BA, and EAS | Work on data mapping for PALM input files | None | |
| Technology Data | Data Mapping Session (Input Files) | 02/24/24 | PM, Technical Lead, BA, and EAS | Work on data mapping for PALM input files | None | |
| Technology Data | Data Mapping Session (FDW) | 02/28/24 | PM, Technical Lead, BA, EAS, and Developers | Work on data mapping for PALM output to FDW application | None | |
| People Processes | DOH PALM HyperCare Team Discussion | 02/06/24 | PM and Key Stakeholders | Develop a HyperCare Plan for DOH after implementation | None | |
| People Processes | DOH Core Meeting | 02/07/24 | Key Stakeholders and PM | <ul style="list-style-type: none"> Monitor progress against project plan Review and approves changes to project plans (resources, scope, goals, cost estimates) Advise on project planning and implementation strategies Make strategic decisions related to project deliverables prioritization and approvals Review and suggest solutions for issues critical to project success Assist in resolving project conflicts Assist and guide on resource allocation | Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks. | |

| | | | | | |
|------------------|------------------|----------|-------------------------|---|---|
| People Processes | DOH Core Meeting | 02/14/24 | Key Stakeholders and PM | <ul style="list-style-type: none"> • Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts • Assist and guide on resource allocation | Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks. |
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| People Processes | DOH Core Meeting | 02/28/24 | Key Stakeholders and PM | <ul style="list-style-type: none"> • Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts • Assist and guide on resource allocation | Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks. |

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

Confirm *

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DOH Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|----------------------------|--------------------|
| January - February 2024 | Robert Herron | robert.herron@flhealth.gov | 03/07/24 |
| November - December 2023 | Robert Herron | robert.herron@flhealth.gov | 01/08/24 |
| September - October 2023 | Robert Herron | robert.herron@flhealth.gov | 11/09/23 |
| July - August 2023 | Robert Herron | robert.herron@flhealth.gov | 09/06/23 |